



Wisconsin Historical Records
Advisory Board

Wisconsin Historical Records Advisory Board Strategic Plan

2024-2030

December 2023



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The Wisconsin Historical Records Advisory Board was created on April 4, 1977 by Governor Patrick Lucey and operates as an independent Board attached to the Wisconsin Historical Society through the support of the National Historical Publications and Records Commission. The WHRAB has used strategic plans since 1996 to direct its support of Wisconsin's historical records keepers.

The WHRAB plays a role in educating, advocating, promoting, planning, and coordinating information about historical records to the general public.

The WHRAB's strategic plan was created following a day long meeting with stakeholders (list available on page 4). To create the plan stakeholders participated in a SOAR (Strengths, Opportunities, Aspirations, and Results) exercise, discussed hopes for the WHRAB's accomplishments in the next five years, and completed a bulls-eye diagram prioritizing aspects of the SOAR.

The Wisconsin Historic Records Advisory Board reaffirms its mission and vision statements.

Mission Statement

The Wisconsin Historical Records Advisory Board promotes the availability and use of records with historical value as keys to the state's cultural heritage. It leads collaborative efforts to preserve records and increase their accessibility by promoting education about archives and best archival practices and by helping Wisconsin organizations obtain federal grant funding. WHRAB advises the Director of the Wisconsin Historical Society and the Governor of Wisconsin on all matters concerning the state's historical records.

Vision Statement

The people of Wisconsin will benefit from a deeper understanding of their heritage through preserved and accessible records that document their diverse and rich history. Acting on their behalf, the Wisconsin Historical Records Advisory Board will serve as the nucleus of a coalition of Wisconsin's historical records organizations, playing the role of educator, advocate, promoter, planner, and coordinator. The Board will aid these constituents directly through federal grant funding and will provide a meeting ground for all of them, fostering common agendas and goals.

Target Audience

The WHRAB remains committed to its role as an advisory board serving its target audience of Wisconsin records creators, organizations with records collections, and institutions providing access to records. Through education and training activities and its role advocating, promoting, and fostering communication the WHRAB supports these organizations in their efforts to promote archives and the use, preservation, and access to historical records for the citizens of Wisconsin.

The WHRAB will strive to connect Wisconsin organizations with interest in, or responsibility for, records and archives; convene interested groups around important historical records issues; and coordinate collaborative solutions to challenges faced by Wisconsin organizations around these issues.



Accomplishments

The Board's 2017-2022 plan outlined three goals and the WHRAB utilized two NHPRC state board programming grants to work toward these goals. Specific accomplishments are noted below:

Goal 1: Provide leadership in Wisconsin for collaborative solutions to historical records preservation and access issues and to promote state partnerships.

- Collaboration with State Archives staff to promote the updated *Wisconsin Municipal Records Manual* (2019-2020). State Archives staff offered six full-day workshops, in person and virtual, to provide training on records management, record schedule application, and electronic records management.
- Sponsor digitization workshops delivered by Recollection Wisconsin (2022-2023), to train historical records keepers on the best practices for digitization.

Goal 2: Promote increased preservation of, and access to, Wisconsin's historical records and collections.

- WHRAB sponsored presentations at the Wisconsin Local History and Historic Preservation Conference covered topics such as collections development, archival processing, copyright, donor relations, and archival management.

Goal 3: Strengthen the informal network of organizations and individuals working together to collect, preserve, and provide access to Wisconsin's historical records.


- The Governor's Archives Award program raises awareness of archives and historical records programs across the state.
- Scholarships to state and national events provide education and training for those who work with historical records and collections.

Landscape Statement

There is not an organization in Wisconsin that brings together historical collecting institutions. As a result, there is currently a lack of understanding surrounding the landscape of collecting. It is clear there are a wide variety of organizations caring for historical records, but there is not a way to connect them to each other. Despite past survey work by the WHRAB, the landscape has changed, and the state has reached a point where there is not clear knowledge about the full makeup of the archival and historical records community in Wisconsin nor what their collecting priorities and concerns are.

The advisory board's 2024-2030 strategic plan will systematically address this need in Wisconsin over a six-year term to make full use of the NHPRC grant funding cycles. The goal is to align the grant-funded projects with the WHRAB strategic plan to better support the goals of each. In addition, the WHRAB seeks to prioritize goals and objectives based on synergy with the Wisconsin Historical Society and achievability of outcomes.

Through measured two-year projects, the Board seeks to serve as a connector between siloed institutions. The WHRAB will use its new strategic plan to identify institutions and collection scopes (year 1-2), build a network where shared needs and interests are identified (year 3-4), and finally (year 5-6) bring together representatives from these organizations to work collaboratively on the needs identified through the network. These are the organizing goals of the 6-year plan.



The WHRAB recognizes that there are two different audiences of this work: local governments that hold permanent records or records with long retention times and institutions that hold archival materials and are staffed with record keeping professionals and/or volunteers. Managing the needs of these two audiences to create a useful products will be an important component of this project. In addition to various audience needs, a critical piece of years 5-6 of the plan will be sustainability of the network.

In addition to implementing a connected network of historical collecting institutions, the WHRAB will continue its successful programs. The Governor's Archives Awards will be offered each year in three categories, six professional development scholarships will be awarded, and the WHRAB will continue to sponsor sessions at the Wisconsin Local History and Historic Preservation Conference.

Landscape survey work will build on past WHRAB projects including the WHRAB mentoring project.

Goals for 2024-2030

Goal 1: Identify the organizational members of the Wisconsin archival and historical records community and their collection scopes.

Goal 2: Build a network where the shared needs and common interest of the Wisconsin record creators, archival, and historical records community are supported to build platforms for collaboration.

Goal 3: Bring together representatives from the Wisconsin archival and historical records community to collaboratively address common needs and concerns. Plan for ongoing collaborative work.

Summary of SOAR Analysis

The Wisconsin Historical Records Advisory Board (WHRAB) and key stakeholders performed a strengths, opportunities, aspirations, results (SOAR) analysis in order to identify the WHRAB's current strengths, its vision for the future, and its strategic goals.

Participants

Cynthia Arbiture, President, Wisconsin Council for Local History
 Menzi L. Behrnd-Klodt, Consulting Archivist
 Clayborn Benson, Wisconsin Black Historical Society
 Amy Cooper Cary, Marquette University
 Anita T. Doering, La Crosse Public Library
 Michelle Gallinger, Consultant Gallinger Consultant
 Mary Huelsbeck, Wisconsin Center for Film and Theater Research
 Greg Kocken, Head Special Collections Librarian and University Archivist UW-Eau Claire
 Tina Krummel, Wisconsin State Genealogical Society
 Lucinda Kue, Wisconsin Historical Society
 Michelle Lewandowski, School Sisters of Notre Dame Archives
 Simone Munson, Madison Police Department
 Abbie Norderhaug, Wisconsin Historical Society
 Richard L. Pifer, Retired Archivist and Archival Educator
 Emily Pfothenauer, Digital Strategist and Grants Manager, WiLS
 Josh Ranger, University Archivist UW-Oshkosh
 Jane Schetter, Public Board Member,
 Pete Shrake, Circus World Museum
 Vicki Tobias, Archivist Strategist
 Kenneth Wirth, Corporate Archivist Johnson Controls

Strengths

The WHRAB and stakeholder group identified a number of strengths related to the board including a strong position within the state to connect various organizations that create or care for historic records. This position is directly related to another identified strength, the passion and longevity of the board members which gives the Board good perspective about the challenges faced by collecting institutions.

The stakeholders also identified the WHRAB's effective use of partnerships as a strength, recognizing that the Board is small, and has few resources. Attendees noted that for the past four years the Board worked with partners (Wisconsin Historical Society and Recollection Wisconsin) to deliver programming to address topics of current interest: records management, with a focus on electronic records management and collection digitization. Continuing to build partnerships will be crucial for success.

Opportunities

Given that Wisconsin's archival and historic records community is disconnected from each other, the WHRAB identified a strong opportunity to act as a liaison between organizations and groups within the state. Additionally, there was strong interest in providing local programming and increasing confidence in records management work for both paper and electronic records.

The strategic planning group discussed avenues to engage a broader and more diverse group of the historical records community such as yearly open meetings or creating a "friends of the WHRAB" group that could be open to many participants and provide a way for them to share their insights and concerns with the WHRAB.



Aspirations

The WHRAB expressed interest in building a network of confident people who are ready to address management of historical records and preservation needs in their work. The WHRAB aspires to build capacity for management of historic records in the state of Wisconsin, address common concerns of the archival community, and identify possible economic drivers.

A common theme throughout the entirety of the SOAR discussion was the desire to connect with archival educators. The WHRAB acknowledges that it needs to foster connections to, and among, emerging professionals. Building a connection with the SLIS Student chapters at UW Madison and UW Milwaukee as well as with archival educators will both develop the profession in the state and gain new perspectives.

The WHRAB also expressed an interest in engaging additional individuals who might be able to bring more diverse perspectives to the Board. The structure and composition of the Board are determined by governor appointment and the Board's composition requirements have not changed significantly since its creation, advocacy at the gubernatorial level for change might be a priority.

Results

The WHRAB named their priorities for results in the next 6 years to include connecting the Wisconsin record keeping community, increasing diversity amongst the board members, taking an active role in the issues that are important to repositories around the state, and creating a clear path for people in Wisconsin to communicate with the WHRAB.

Action Plan Recommendations


Goal 1: *Identify the organizational members of the Wisconsin archival and historical records community and their collection scopes.*

- Author a white paper on archival scope and collecting to facilitate understanding the relationships in historical records keeping between local governments, local historical societies, and other groups.
- Develop a comprehensive understanding of the archival and historical records organizations and their collecting practices in Wisconsin.
- Produce a list of organizations and their collecting priorities. This list is not a directory of individuals which would need to be maintained every year as individuals change positions. Rather, it is a list of organizations and their collecting goals which is relatively stable and will not need constant maintenance.

Goal 2: *Build a network where the shared needs and common interest of the Wisconsin archival and historical records community are supported.*

- Use the landscape analysis performed to create an umbrella network to connect the archival and historic records organizations and break down the silos the currently exist in Wisconsin.
- Increase the connection between organizations with the goals of deeper connection, increased diversity, and collaborative problem-solving.

Goal 3: *Bring together representatives from the Wisconsin archival and historical records community to collaboratively address common needs and concerns.*

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- Increase in the number of partner organizations with which the WHRAB works
 - Increase awareness among organizations with records responsibilities of the WHRAB as a resource
 - Develop paragraph about the WHRAB, a WHRAB style guide, and template for press releases
 - Communicate with archives administration and public history programs